Market Highlights
## Cleaning & Hygiene Product Basket

December 2022

Market Size
Total Cleaning & Hygiene Product Basket

1.9 Billion €

(Oct '21 – Sep '22)

See Slides 7-9 for Scope and Definitions

PRECISION
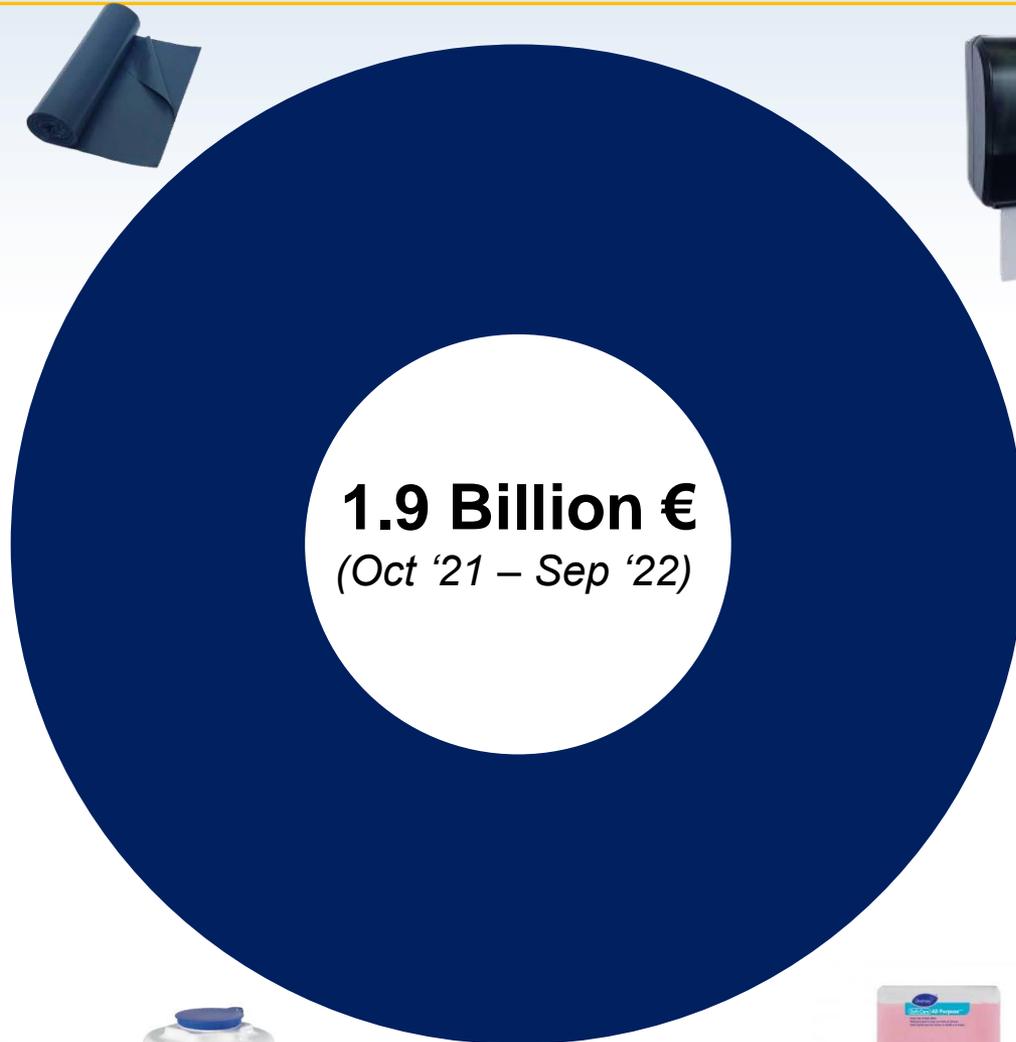
Market Size
By Product Category – millions (€)

Pie chart: **1.9 Billion €** *(Oct '21 – Sep '22)*

- Other 19 €
- Towels 150 €
- Can Liners 131 €
- Bath Tissue 122 €
- Non-Powered Equipment 262 €
- Cleaning Chemicals 393 €
- Powered Equipment 225 €
- Skin Care 112 €
- Laundry & Warewash 300 €
- Dry Wipers 84 €
- Wet Wipers 75 €

See Slides 7-9 for Scope and Definitions

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PRECISION

Market Size
By Customer Segment/Vertical – millions (€)

1.9 Billion €
(Oct '21 – Sep '22)

- Healthcare 363 €
- Industrial / Manufacturing 412 €
- Office 214 €
- Restaurants & Catering 222 €
- Education 126 €
- Retail 117 €
- High Traffic 80 €
- Grocery 94 €
- Lodging 134 €
- All Other 111 €
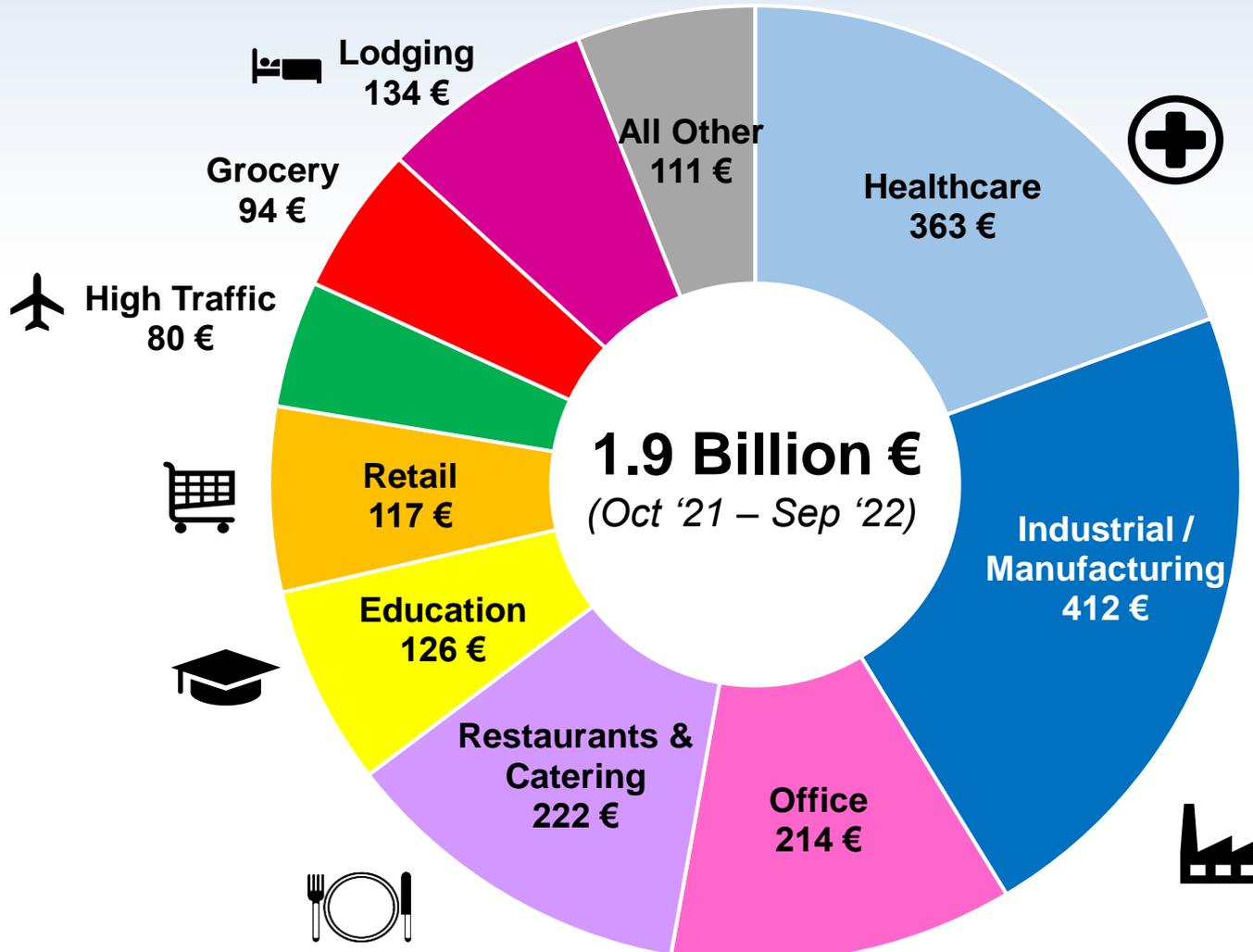
Total Cleaning & Hygiene Product Basket
See Slides 7-9 for Scope and Definitions
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PRECISION

Net Sales (including volume & price)
Total Cleaning & Hygiene Product Basket

Q2 2021: *COVID-19 restrictions begin to ease*

Chart values:
- 2019 Avg: 100
- 2020 Q1: 105
- 2020 Q2: 70
- 2020 Q3: 75
- 2020 Q4: 71
- 2021 Q1: 72
- 2021 Q2: 81
- 2021 Q3: 82
- 2021 Q4: 87
- 2022 Q1: 85
- 2022 Q2: 92
- 2022 Q3: 99

See Slides 7-9 for Scope and Definitions

PRECISION
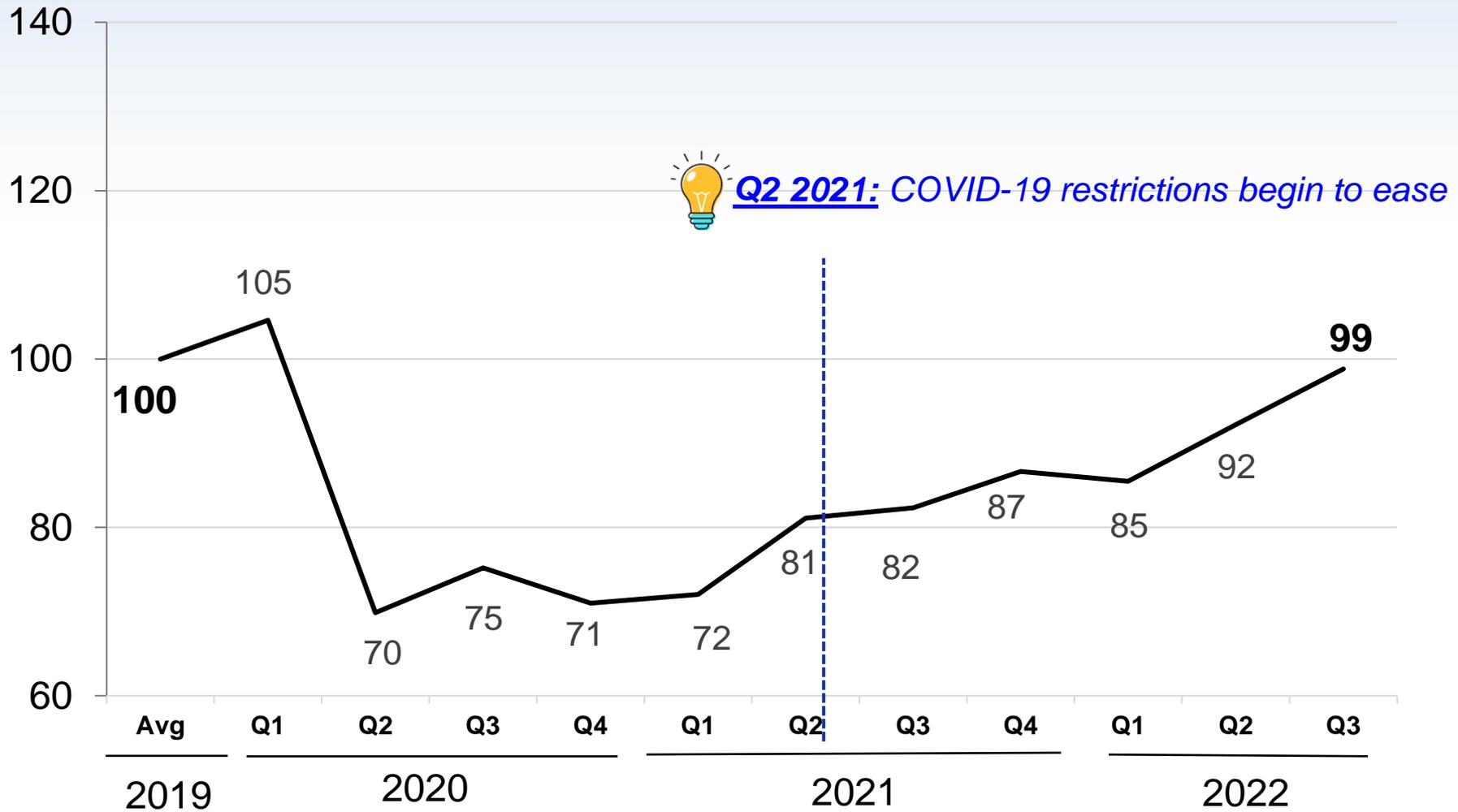
Other Market Insights
Available Upon Request – for example:

- By Category by quarter (slide 3)

    o Customized Categories & Subcategories

- By Customer Segment/Vertical by quarter (slide 4)

    o Customized Segments/Verticals & Subsegments/Subverticals

- Growth split between volume and price (slide 5)

    o By Category and Segment/Vertical

- Other market details as requested

PRECISION

Scope and Definitions

- B2B Professional Market, Away from Home (Excludes Consumer Purchases)

- All Distribution Channels, including Retail/C&C and eCommerce Pure Plays

- Customer €'s (from Distributor to Customer) in Millions. Includes distributor mark-up

- Market Size: October 2021 – September 2022 (12 months)

- Geography = Italy

- Excludes Exports

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Category Definitions

Towels
Rolled and folded disposable paper towels. May be used with a wall-mounted dispenser or placed upright on a flat surface. Excludes Kitchen Roll Towels (KRT)

Bath Tissue
Single & jumbo rolled, folded, and coreless & centrefeed bath tissue

Cleaning Chemicals
Cleaning & disinfecting liquids, ready-to-use, concentrates, dilution control systems, hard floor care, other chemicals

Skin Care
Hand soap & sanitizer, moisturizer, industrial cleaner, and protectant

Dry Wipers
General purpose paper and general & specialized non-woven wipers
Excludes rags & shop towels, couch covers, microfibers, and pre-saturated/treated wipers

Wet Wipers
Germicidal, disinfecting, general purpose, and foodservice pre-saturated wipers intended for hard surfaces. Excludes Wipers intended for use on skin.

Laundry & Warewash
Commercial & non-commercial laundry & warewash chemicals

Powered Equipment
Vacuums, carpet extractors, sweepers, scrubbers, burnishers/floor machines, electrostatic sprayers, and others

Non-Powered Equipment
Floor pads, mops, buckets, scrapers, carts, dusters, waste receptacles, mats & matting, and others

Can Liners
Garbage bags, high & low-density liners, specialty liners

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Customer Segment/Vertical Definitions

Healthcare
Acute care (for example: hospitals), long-term care (for example: care homes), primary care, and all other healthcare facilities

Restaurants & Catering
Commercial restaurants, non-commercial restaurants, and managed services.

Industrial
Facilities that manufacture, transform, & process items including food processing.

Office
Office buildings in industries such as finance, Information Technology, legal, consulting, and others.

Education
All public, private, and non-traditional institutions that educate students.

Retail (not for resale)
Non-grocery retailers (not for resale)

High Traffic
High-traffic locations where patrons are present for a specific event such as airports, stadiums, theaters, churches, and others

Lodging
Includes temporary lodging and travel accommodations.

Grocery
Includes grocery (not for resale)

All Other
Includes non-office government such as prisons, oil & gas, mining, agriculture, and others

PRECISION

Precision Syndicated Market Insights

- B2B Data Feeds (transactional point-of-sale data)
  - o 300+ unique data sources
  - o €4 billion+ per month
  - o 380 million+ sales invoice transactions annually
  - o 14 million+ ship-to locations annually
- 20+ years industry experience

Europe		*North America*	*South America*	*Asia*	*Oceania*	*Africa*
Germany	Slovakia	USA	Brazil	India	Australia	South Africa
France	Switzerland	Canada	Colombia	China	New Zealand	Egypt
UK	Ireland	Mexico	Peru	Thailand		Nigeria
Italy	Belgium		Chile	UAE		Morocco
Spain	Netherlands		Argentina	Israel		Others
Portugal	Poland		Others	Saudi Arabia		
Greece	Czech Republic			South Korea		
Turkey	Others			Indonesia		
				Others		

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